Account team exits raise eyebrows

Execs say JWT, Kodak not shaky

By GAY JERVEY

NEW YORK—A highly uncharacteristic series of personnel changes on the Eastman Kodak account at J. Walter Thompson USA has raised questions about the future course this 51-year-old marriage will follow. According to JWT and Kodak, the future is positive.

Speculation followed the word that at least four key JWT execs have left the Kodak account in recent weeks. They are William C. Thompson, a JWT exec vp; senior vp John Wells; senior vp William Campbell, and Thomas Hanft, vp.

On July 15, Mr. Thompson will join McCann-Erickson as exec vp-director of account development, a new position, and as a director. A 17-year JWT veteran, Mr. Thompson has for the last five years been focusing his attention almost exclusively on Kodak's worldwide business, most recently as exec vp and member of both the U.S. and worldwide boards.

That McCann and Kodak are no strangers only makes the development more interesting. During the past few years, Kodak has been giving more of its international business to McCann. In 1978, Kodak Ltd., the U.K. subsidiary, moved its account from JWT London to McCann London. And in September, 1981, Kodak's Brazilian arm made the same agency change for its Ektra camera line.

Furthermore, when Kodak decided to move its instant camera business out of JWT several years

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Introducing fitted Pampers.
They help give your baby wetness protection right down to her toes!
Pampers
they're at a Pampers price.

Expanding Pampers Procter & Gamble has moved Pampers with "stay-dry gathers" into Denver, Los Angeles, San Francisco, St. Louis and Hawaii. The new version of Pampers, with elasticized legs, had been in the Fort Wayne and Cincinnati areas for several months (AA, March 15). Agency is Benton & Bowles, New York.

Next week: Top media

Next week ADVERTISING AGE presents its second report on America's 100 Leading Media Companies. The report includes profiles of each of the 100 companies, summarizing their recent activities, and includes complete listings of their holdings. Interspersed with the profiles are features on companies and individuals of special interest, along with tables listing top newspapers in circulation and ad linage gains, "hottest" magazines, largest cable systems and others.

The first AA report on top media companies ran last December. Beginning with next week's issue, the report will appear annually at midyear.

Anti fever hits Argentina

BUENOS AIRES—Anti-American sentiment was growing here after the Argentine surrender of the Falkland Islands (Malvinas) to the British last week, and it already is having an impact on marketing and advertising.

The war's end not only toppled the current government, but is causing advertisers to take a look at their campaigns, and possibly at their affiliation with various American ad agencies, according to sources.

Earlier this month, Economy Minister Roberto Alemann warned the presidents of North American companies that about 10 lists of U.S. companies and their products here are being circulated among unions, political parties and student organizations for use in action campaigns, "including a possible boycott," according to one exec who attended the unpublicized meeting.

Mr. Alemann reportedly told the company presidents that the government "is not involved in any way with such a campaign," and that the police are investigating the matter.

However, sources in the Peronist party, Argentina's largest opposition party, and trade union sources said such lists do not exist.

"I have heard that rumor and it is false," a high-ranking Peronist said. He said he believed that uncontrolled government security forces, linked to the Public Information Secretariat, are spreading rumors that lists exist and that they plan to place phone calls to U.S. companies demanding money to get the company off the list.

"I think Roberto Alemann is being used by them to give the concept credibility," the source said. "I don't think he's involved."

Nonetheless, during the last month of the Falkland (Malvinas) crisis, anti-American posters were hung in the city, listing the names of several U.S. companies and some of their products, sources say. They usually were taken down by police.

The possibility of increasing hostility toward things American has local media magnate Pedro Simoncini worried that he won't be able

(Continued on Page 78)

highlights

Monday, June 21, 1982

Nickelodeon cable channel for children is playing a new ad tune —this time for parents. *See Page 10.*

Allied Stores studies consolidation of divisions. *See Page 10.*

The consumer electronics industry was pleased to hear from the Supreme Court that it will tackle the copyright issue involving videocassette recorders. *See Page 12.*

Ethan Allen runs corporate responsibility messages, a new twist in home furnishings advertising. *See Page 14.*

David B. Keith of Houston Natural Gas takes over as chairman of the American Advertising Federation. *See Page 24.*

A "Licensing '82" panel featured Mego Corp., Griffin/Bacal and Westport Marketing Group execs with advice and case histories on licensed merchandise. *See Page 32.*

Toy and tv licensers vied with those representing tv and movie properties at the "Licensing '82" exhibition. *See Page 32.*

The average Southeast Asian doesn't want to be the first on his block to own anything, according to the former head of John Roddy/FCB in Hong Kong. *See Page 35.*

Abra K Dabra, a pizza entertainment restaurant, will try to cook up some profits to sustain retail operations of parent K mart. *See Page 35.*

Members Only starts a trend with status jackets, and others follow. *See Page 41.*

Grey Advertising, Los Angeles, and Meldrum & Fewsmith, Cleveland, were top winners at the National Addy awards ceremony. *See Page 42.*

Godfather Pizza withdrew an ad that claims its pizzas weigh 5 lbs. after the National Advertising Division overruled its defense. *See Page 58.*

The Electronic Media Rating Council is the new name for what formerly was the Broadcasting Rating Council. *See Page 61.*

Helene Curtis' plunge into the high end of the haircare business is based on its faith in Finesse conditioner. *See Page 71.*

For the first time ever, private radio stations in Belgium are playing advertising. *See Page 72.*

Satellite News Channels, "The Non-Stop News Machine," has started up for 2.6 million subscribers. *See Page 73.*

"Volunteerism" got a push at the American Advertising Federation convention last week. *See Page 74.*

The down economy boosts direct marketing. *See Page 74.*

CORPORATE CLOSEUP

Igloo Corp., after successful tests, is taking its case to the public in a concentrated tv campaign that is expected to spread nationally. *See Page 4.*

INTERNATIONAL

NCK Spain is making headline ad news, walking off with two top accounts in the last few weeks. *See Page 54.*

VIDEOTECH

Home Box Office has unveiled a wave of original-program product. *See Page 45.*

Regional brewers become enamored of cable tv in battling national brands. *See Page 47.*

MAGAZINE

First in an automotive marketing series, "Marketing on the Road," takes a behind-the-wheels look at luxury cars. *See Page M-2.*

More than ever, corporate image is reflected in the bottom line and must be managed as any other asset or liability, says a public relations executive. *See Page M-48.*

SPECIAL REPORT

From convertibles to concept vehicles, this week's Special Report investigates how U.S. auto makers are making adjustments to cure the market's ills—and keep up with their foreign competition. *See Page M-7.*

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'Cleveland Press' dies at age 103

CLEVELAND—As recently as six weeks ago management of the *Cleveland Press* denied their problems were serious enough to cause the demise of the 103-year-old newspaper—going so far as to accuse their competition of starting shutdown rumors. But the death blow came suddenly last Thursday with the simple announcement to employes: "Today will be the last issue of the *Cleveland Press.*"

This is the sixth major afternoon newspaper to fold in the last year.

In recent months the *Press,* owned by industrialist Joseph E. Cole since he purchased it from E.W. Scripps Co. in November, 1980, has made many changes calculated to save money and prolong its life.

A 25¢ Sunday edition was launched with much fanfare last August. But late last month, as Sunday circulation figures dipped to 275,000 compared to about 316,000 during the week, *Press* executives turned the Sunday edition into a weekend paper, charging the same ad rates as it had been charging for the Saturday paper.

And in March, the *Press* became an all-day newspaper, putting it in direct competition with the morning *Plain Dealer,* the dominant fac-

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summer, apparently before introduction of the rest of the '83 models.

Ford Thunderbird and Mercury XR-7 will also get a new look for 1983. The slightly down-sized new models, with all new sheet metal and quite a different appearance from current models, will be introduced in early winter.

The new Thunderbird will have styling similar to Ford Motor Co.'s Continental Concept 90 show car.

Taking no chances, Ford is planning to be ready for any market rebound with something new in almost every category except subcompact, where its Escort and Lynx have been doing relatively well.

Next spring an all-new line of compact cars, the Ford Tempo and Mercury Topaz, will debut. Based on a stretched version of the Escort, they will replace the Ford Fairmont and Mercury Zephyr.

With such a broad revamping of its product line, Ford will probably benefit from any general upswing, as it will have something new for almost everyone.

Chrysler Corp. will introduce its biggest front-drive models this fall, the E bodies. They will be about three inches longer than the K-cars and will be known as the Chrysler New Yorker, the Gran LeBaron, the Dodge 600 and 600 ES.

The current New Yorker is Chrysler's biggest old-fashioned rear-drive car and is also its hottest-selling model. It will be kept in 1983 but renamed the Fifth Avenue.

While there won't be the big multi-line alphabetical introductions from General Motors of recent years—X-cars, J-cars, A-bodies, and the like—or anything big from Chrysler Corp., there is enough new in Detroit's '83 lineup to elicit buyer interest, perhaps even some passion.

It could be that when the economy heats up, so will the love affair with the automobile. The course of true love always runs smoother with a little money in the pocket.

U.S. compact pickup trucks on a roll

After six months, GM leads the pack to grab half the market

By Don Edgar

Six months may seem like a short time for some folks. But if you are linked with the automotive industry in any way, the days, weeks and months can drag on.

Yet, for one particular segment of the industry, six months turned out to be enough time to accomplish something its counterparts have been trying to do for some years—make headway in the battle against the imports. In those six months the American automotive manufacturers overtook and passed Japanese imports in the small, compact pickup truck sales derby.

While the Japanese have had a stranglehold on the market since the mid-1960s, domestic companies appear to have seized the initiative.

Starting last October with the introduction of the Chevrolet S-10 and GMC S-15 pickups, U.S. auto makers gathered 51% of the market in March, based primarily on the strength of the two General Motors products. The Ford Ranger and Dodge Rampage joined the race after the first of the year.

Several auto executives in Detroit have forecasted annual sales of compact trucks to reach a million units by 1985—perhaps even before. While the Japanese, principally Toyota and Datsun, have had a stranglehold on the compact truck market since the mid-1960s, domestic companies appear to have seized the initiative and the battle for sales leadership has begun.

Figures supplied by the Motor Vehicle Manufacturers Assn. show that GM's dynamic new duo outsold both Datsun and Toyota during February and March and were responsible for domestic models' wresting away the sales leadership in March when U.S.-built compact pickups captured 50.89% of the market. Contributing to the over-all success for the domestics were the AMC/Jeep Scrambler, Ford Ranger, Dodge Rampage and Volkswagen pickup, while Ford Courier, Chevy Luv, Dodge Ram 50 and Plymouth Arrow, sold by American dealerships, were tallied in the imports' column. (See chart.)

"Chevrolet is very pleased with the acceptance of the S-10 pickup," noted M.H. Erdman, Chevrolet national truck sales manager. "Since January we have outsold our main foreign competitor by a wide margin."

Chevrolet took the real message to the consumer, noted Mr. Erdman. "Our advertising was built around the premise of product quality, payload, towing capability and mileage—items the customer previously associated with our competitors," he said.

The success of the S-10 has had some impact on the sales of regular-size Chevrolet pickup trucks and the imported Luv. Full-size pickup sales are off about 8% when compared with a year ago, while Luv sales, for the first three months of 1982, have fallen from 23,905 to 8,826 units. These changes were anticipated, stressed Mr. Erdman.

When 1983 introduction time rolls around, Chevrolet plans to be ready with three new offerings in the S-10 category. "Spectacular," is the way Mr. Erdman phrased it. Chevy is slated to have a four-wheel-drive pickup along with an extended cab model and a down-sized Blazer. An S-10 diesel engine version is also on the horizon, but it will be smaller than the currently popular 6.2-liter V-8 selling so well among full-size Blazers, Suburbans and pickups.

"Our advertising was built around product quality, payload, towing capability and mileage—items previously associated with our competitors."

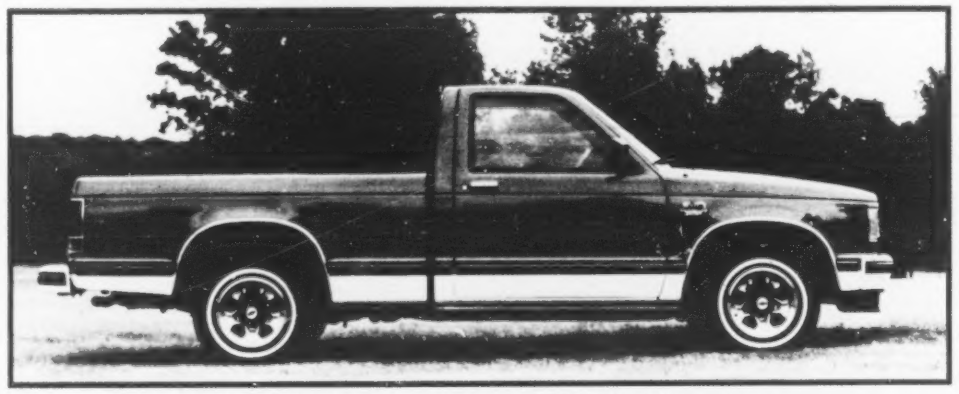
Mr. Erdman could not predict a time frame for smaller vans and van wagons.

Advertising strategy will remain about the same for Chevy's S-10. "We go right to the heart of the issue because we have the vehicle that can handle customer requirements," Mr. Erdman added. "We name names in our commercials, and we haven't done that in a long, long time. Once we get a customer to test drive an S-10, we feel certain we'll get the sale."

Ford views the competition in a different light, according to William Barnes, Ford's light truck sales manager. The company, he said, compares its sales launch to that of Chevrolet's S-10 instead of matching sales figures with Toyota and Datsun.

"Looking at the first three 10-day periods for the Ranger and the S-10, Ford had an advantage of 1,500 more sales," he said. "During the first 10-day period in April, Ford bested Chevy by a couple hundred pieces. The Ranger is going very well and as

(Continued on Page M-16)



The S-10 turned out to be a good catch for Chevrolet.

Retail Sales of Compact Pickup Trucks

	Oct. 1981	Nov. 1981	Dec. 1981	Jan. 1982	Feb. 1982	March 1982	Six Month Totals
Jeep Scrambler	811	819	652	577	649	686	4,194
GM, S-Series	1645	7609	8529	13444	20985	29969	82,181
Ford Ranger	—	—	—	—	1440	8288	9,728
Dodge Rampage	—	—	—	973	1312	2172	4,457
Volkswagen	3196	2212	2833	1115	1305	1599	12,260
Domestic Totals	**5652**	**10640**	**12014**	**16109**	**25691**	**42714**	**112,820**
Ford Courier	5337	4859	3869	4228	3599	2584	24,476
Chevrolet LUV	3416	2475	1696	2750	2930	3146	16,413
Plymouth Arrow	477	501	546	653	863	467	3,507
Dodge Ram 50	1143	1296	1907	3481	3618	4169	15,614
Toyota	9099	9044	11624	8468	10440	14331	63,006
Datsun	7617	8054	10424	6245	6955	11452	50,746
Mazda	1449	1585	898	1739	2930	3602	12,203
Isuzu	1251	1159	1184	1198	1105	1473	7,370
Import Totals	**29789**	**28973**	**32148**	**28762**	**32440**	**41224**	**193,336**
Total Sales	**35441**	**39613**	**44162**	**44871**	**58131**	**83938**	**306,156**
% of Sales-Domestic	**15.95**	**26.86**	**27.20**	**35.90**	**44.20**	**50.89**	**36.85%**

Source: Motor Vehicle Manufacturers Assn.

Don Edgar is a free lance writer in the Detroit area. He reported on trucks in last year's Automotive Marketing Special Report.

Compact trucks

(Continued from Page M-9)
the pipeline fills up, we'll have more ability to supply Rangers to the market."

According to Mr. Barnes, Ford sees the compact segment rising to about 30% of the total market. "Our share of the compact truck market is going up and the Japanese share is coming down. Ford is tracking ahead of its program and we are more than pleased."

Ranger sales have affected the market for the regular F-series pickup trucks, but how much "is difficult to measure," Mr. Barnes said. "We had anticipated very heavy substitution—in the neighborhood of 30% to 50%. However, the market has been so weak it is difficult to get a real handle on it. Everything is further clouded by the fact that General Motors has a diesel [in a Luv] and Ford doesn't yet.

"The imported Courier is also affected. When was the last time anyone saw a Courier advertisement or commercial? All our efforts have been directed purely

(Continued on Page M-18)

The new Dodge Rampage is targeted to the youth market.

Thoughts

(Continued from Page M-12)
eral Motors, a chief critic of the Chrysler bailout at the time it was proposed, has sought to use nearly every segment of the Chrysler bailout blueprint in some form. So have the Ford Motor Co., the American Motors Corp. and International Harvester, to name a few.

American manufacturers have initiated accelerated programs aimed at learning how to compete in today's market. While falling short of reinventing the automobile, they are reinventing the industry that makes it.

Taking its cues from the Japanese, the American industry has begun to go beyond just retooling its automobiles to run farther on less gas. Manufacturing and assembly operations are undergoing major surgery, not simply being automated, with some input from the long ignored factory worker. Supply pipelines are being rethought with competitive bidding being tried for such products as steel, with tough decisions being made about whether the company makes a product inhouse or buys it from outside.

Missing from all this activity is a sense of sincerity on the part of Detroit, a feeling by the public that the industry is serious about wanting to win back the respect of its home-turf American buyers by being truly innovative over the long haul. The reasons for this persistent uneasiness are numerous.

With respect to product, the all-new models more often turn out to be warmed-over models, much like their predecessors, and still trailing the pace-setting Japanese with respect to innovation. The customers, hard pressed as they are to buy anything, aren't impressed by what's in the showrooms, nor by the repair shop work and costs required on the new models.

Labor finds it difficult to believe that management wants to develop a new partnership when "give backs" are matched by Chrysler's recruiting management talent with country club dues paid by the company. Or, more recently, General Motors' promising select salaried workers that they will not be adversely affected by further wage cuts only days after promising labor at the bargaining table that all would sacrifice equally.

Car buyers may be disenchanted, too, with much of the regulation from Washington. But many find it tough to feel that Detroit deserves to get back in good standing when it continues a blanket assault upon laws that seek to control pollution emissions from automobiles, improve the fuel economy of automobiles and improve their safety. They are as suspect of Detroit's long-term commitment to quality also, especially when programs such as the revived Chrysler five-year, 50,000-mile warranty are limited-time-only offers rather than standard operating procedure.

The auto executives say it costs too much to do something like that. In the marketplace the message again and again is that it may cost as much not to. The same can be said of rebates and limited-time-only price cuts.

A strong economy will bring the industry temporary renewal and perhaps save it the need to confront its public with more than glossy ads and radiant commercials that haven't done the trick. Credibility in the workplace and the marketplace could give that renewal longevity. The most innovative step American manufacturers could take would be to stop the gimmickry. AA

BECAUSE OF
MEN LIKE LEONARDO DA VINCI.

"A MAN WITH WINGS LARGE ENOUGH AND DULY ATTACHED MIGHT LEARN TO OVERCOME THE RESISTANCE OF THE AIR, AND CONQUERING IT SUCCEED IN SUBJUGATING IT AND RAISE HIMSELF UPON IT."
–LEONARDO DA VINCI, 1452-1519

OMNI Magazine recognizes that science is not just the province of scientists, but of all thinking men and women. That's why a man like Leonardo Da Vinci, who was an artist and metaphysician as well as the only professional scientist of his time, could envision man traveling through the air four centuries before the Wright Brothers, Apollo, or even hang gliding. Leonardo was a man of vision and imagination, the most basic elements of science. In his day, they called his flying machine wild speculation, fiction. Today, we would call it prophetic.

Which is why OMNI feels that science fiction is as much a part of science as are laboratories and textbooks . . . and why every month, more than 5.4 million OMNI readers (MRI 1982) have come to see the full scope of today's science–and tomorrow's. Join us on the New Frontier. OMNI Magazine. It will change the face of science journalism forever.

OMNI

ADVERTISE IN OUR SPECIAL OCTOBER ANNIVERSARY ISSUE. CLOSING DATE AUGUST 1, 1982.

Compact trucks

(Continued from Page M-16)

at the Ranger. And we introduced Ranger with two years of Ford Care [a policy that includes no charge for standard maintenance such as oil, lubrication and filters]. We have since added a $300 rebate [$500 in California]."

As for the future at Ford, look for refinements in the pickup to boost both the payload and trailer towing capacities. A new down-sized Bronco II is scheduled to appear in 1983. Later this year, Rangers equipped with a diesel engine and with a four-wheel drive will be available. The diesel is a 2.2-liter, four-cylinder that Toyo Kogyo Co.'s Mazda introduced in a pickup last February. The four-wheel-drive Ranger will have a V-6 engine.

While its success has not been as great as the General Motors and Ford compact trucks, Pat Keegan, director of sales operations for trucks at Chrysler, said that the company is more than excited with how the Dodge Rampage has taken a fair segment of the market.

"We want to eat into the Chevy S-10 and Ford Ranger part of the business," he said. "And with a payload capacity of 1,140 lbs., the Dodge Rampage is going to compete."

Marketing strategy for the Rampage will remain much the same. The small car/truck is appealing to the youth market, and Rampage's marketers are considering some modification to take advantage of the public's perception of the model as a "racy little truck."

AMC's Jeep Scrambler averages 23 mpg in city driving.

Meanwhile, Chrysler's minivan, called the T-115, is getting closer to introduction, although Mr. Keegan wouldn't speculate on a date other than to say "before 1985."

"The T-115 will be a seven passenger, garagable unit and will be a high volume vehicle," he said. "We look for it to become a substitute for the conventional station wagon. Chrysler is continuing to explore other small truck ventures."

At American Motors, attention is focused on the Jeep Scrambler. "The Jeep Scrambler has been out for about a year now and the launch of the product was better than we anticipated," said Dean Greb, director of marketing with Jeep. "We ended up selling about 8,000 Scramblers. This year we expect to sell about 10,000 units."

With a five-speed manual transmission and the four-cylinder engine, the Scrambler has the best mileage rating for any four-wheel-drive compact pickup truck. The numbers are 23 miles per gallon in city traffic and 28 mpg on the highway.

"Part of Jeep's selling strategy was to lower the base price to $6,765, a reduction of $823. This gives Scrambler about a $1,000 advantage over the four-wheel-drive pickups from Datsun, Toyota and Chevy Luv," Mr. Greb said.

Based on Jeep's consumer research, a tweaking of the initial marketing plan is likely. More buyers perceive the Scrambler to be a compact pickup than the company originally thought. Scrambler will continue to be billed as the "pickup that picks up where others leave off."

"A year from now we'll have a compact of trio units on our present J-series," Mr. Greb said. "Basically a new model from the ground up, Jeep will have a Cherokee, Wagoneer and a pickup truck—size and performance to compete with Chevrolet's S-Series and Ford's Rangers."

In Japan, the importers will be busy upgrading their offerings to regain a better foothold in the lucrative American compact truck market.

But it should be interesting to see if Chevrolet and Ford can stave off the imports and battle each other, as in the past, for the No. 1 position in the small truck race. Only time will tell. AA

IF YOU DON'T DO IT NOW, YOUR COMPETITION WILL.

They'll be Joining the Nation's Leading Shopping Mall Promoter to demonstrate their automotive products to 1.5 million people, on Two 10-week tours of America's largest Shopping Centers...

The Shopping Center Network (**SCN**) will be touring America with TWO exclusive multi-company shows of automotive products. Our Eastern Tour begins September of 1983, and our Western tour starts in April of 1984.

More than 1.5 million people will visit each exhibit, see product demonstrations, and be convincingly impressed by your competitor's product, unless you act now.

Who Is The Shopping Center Network?

For nearly a decade **SCN** has been producing corporate exhibitions for sponsors like: *CHEVROLET, R.J. REYNOLDS, CLAIROL, GILLETTE, CANON, CBS, BURGER KING, EASTMAN KODAK, EASTERN AIRLINES, RCA and THE U.S. DEPARTMENT OF ENERGY...* and bringing them to the people thru our network of over 1600 of the largest and most influential enclosed regional malls in the nation.

And now for the first time, we're putting together a program just for the automotive industry called:

The Car Care Clinic.

Here's How The Car Care Clinic Works.

SCN will arrange for each major mall on the tour to house **The Car Care Clinic** exhibition each weekend, with over 20 leading manufacturers of auto related products.

Full audio, visual and live hourly spokesperson demonstrators will maintain our show's excitement and continuity. **SCN** also handles all logistical support... including scheduling, trucking, fuel, maintenance, set-up and take-down, insurance, product sampling, literature distribution... the works.

Each exhibitor can supply his own exhibit or if you prefer, **SCN** will design, build, train personnel and man your display at a pre-arranged fee.

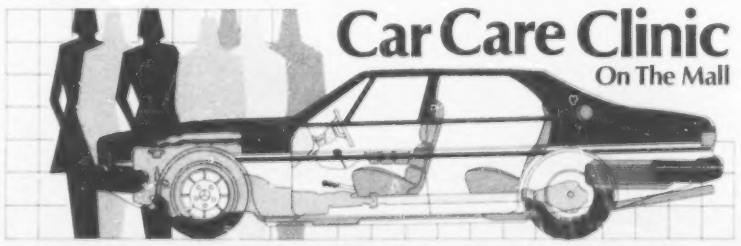
The Competitive Edge

To make it even more enticing, **SCN** will guarantee exclusivity of product line on a first come-first served basis.

How Do I Sign Up?

For more information about this new marketing concept for the 1980's and for our detailed **Car Care Clinic** brochure, call Mr. Joel Benson, President of Shopping Center Network at (305) 595-0201 in Miami or write to us at 10651 Kendall Dr., Miami, FL 33176 Suite #110.

Eastern Tour Sept., 1983
Western Tour April, 1984



advertiser was going to get overly concerned about the medium's failings.

But advertisers and tv networks can no longer afford this luxury.

Not only has the rapid growth in the number of tv households come to an end, but network programs are facing increasing competition from pay cable and subscription television—and that's why network executives should start paying much closer attention to research efforts such as those at Television Audience Assessment (TAA).

"Our goals are to develop and test a system of audience measurement based on viewers' attitudes and responses to programs, and to demonstrate to industry decision makers the utility of these measures as an additional form of program ratings for cable and broadcast television," says TAA president Elizabeth J. Roberts, whose nonprofit organization is funded by grants from various groups, including the Ford and Markle Foundations.

Current and recently completed TAA projects include efforts to study:

- The "halo" effect that placement of ads on highly appreciated programs may have on the corporate image of the advertisers.
- How viewing decisions and program involvement levels of pay cable subscribers differ from those of the general public.
- How channel-switching patterns in 12-channel households, for example, compare with those in 30-channel homes.

The TAA effort is not the first attempt to perform qualitative assessments of tv programs and audiences. In recent years, Bristol-Myers reportedly has done a private study of the relationship between program type and ad effectiveness, and J. Walter Thompson USA reportedly has conducted proprietary research on the relationship between the incidence of sex and violence on a tv show and the program's effectiveness as an ad vehicle. And in such countries as Canada, France, Great Britain and the Netherlands, where television has been under greater government control than in the U.S., a variety of qualitative measures have been incorporated in the various rating systems.

My bet is that researchers will find that quality programs will be the ones to rate high in audience interest. If this can be combined with current research that (1) develops a new attitudinal rating system that can distinguish shows generating a high audience interest and (2) demonstrates that high interest programs are superior ad vehicles, then television executives finally will find themselves motivated to eliminate the pablum that accounts for so much of today's network programing.

So far—and probably for the near future—the efforts to develop attitudinal ratings will raise more questions than they answer. Is viewer involvement with a particular program constant or does it vary from episode to episode? Do some kinds of commercials do better on a low-involvement program than on a high-involvement show?

And the big question: How will the advertising community—which likes "hard numbers" like the set-counts provided by Nielsen and Arbitron—respond to the "soft numbers" coming from surveys of consumer attitudes?

No one says that dealing with the problem of improving our television rating systems—and television programing—will be easy.

The "measurement challenge" that faced physicists in the 1920s resulted in one of the most turbulent periods in the history of the science, but by the time scientists finally got things straightened out, the turmoil had paved the way for a period of remarkable creativity and progress.

Let's hope the same will hold true for the television industry. AA

Promotion Trends

By Louis J. Haugh

Judging the most valuable

In a period of generally flat restaurant sales, it is probably appropriate that entrants in this year's ninth annual Pepsi-Cola Most Valuable Promotion competition have concentrated on price and coupon discounts as a key marketing strategy.

The winners were honored recently at the National Restaurant Show in Chicago. This year, for the first time in the nine years the contest has been sponsored by Pepsi, the panel of six judges commented that creativity among the entries seemed to have dropped off but that the contest reflects restaurant promotion activity quite accurately.

The contest is judged on three criteria: Originality of idea, creativity of execution and accomplishment of measurable objectives. The judges were three food service business papers' editors and three others, including this writer, familiar with food service and promotion.

It is interesting that the contest's winners have not had the spectacular sales and traffic increases of previous years. Among this year's winners, average sales were up 17% and traffic was up 13% as compared with sales increases of 49% on increased traffic of 81% in 1981. As a rule, promotions were aimed not so much at getting new customers as getting customers to increase their purchases. Price discounts were used by 45% of all entries, compared with only 16% the year earlier. Coupon discounts were used by 27% of all entrants this year.

At the same time, sweepstakes promotions were off, dropping from 30% of all promotions last year to 18% this year. New product activity also was off significantly, from 21% of the promotions involving new products or services last year down to only 7% this year.

Among the entrants, the percentage using radio advertising was off from 54% last year to 43%, and television was down from 28% to 15%, continuing a three-year decline from a high of 58% in 1980. Some of this decline in tv advertising may be explained by looking at the MVP entries, which are divided into three categories, restaurants with fewer than 30 units, those with 31 to 100 units and those with 100-plus units.

The MVP contest has generated more entries from smaller restaurants, which are less likely to use tv advertising. This year, 76% of all entrants in the 100-plus category reported using tv advertising, compared with 75% last year.

Use of instore materials to support a promotion has remained virtually constant over the three years, 62% this year, 54% last year and 60% the year earlier. Newspaper support has also remained constant, 45% this year, 48% last year and 47% the year earlier.

Use of premiums appears to have slipped over the three year period, from 40% in 1980, to 33% in 1981 and 26% this year. Use of direct mail increased from 13% last year to 23% this year, and use of publicity is also up, rising from 20% last year to 24% this year.

The number of restaurants that promoted with charity tie-ins also increased, from 13% in 1981 to 34% this year. In fact the MVP grand prize winner, Boddie-Noell Enterprises, Rocky Mount, N.C., a Hardee's franchisee in Virginia, mounted a statewide four-phase promotion to raise funds for mentally retarded children in the Special Olympics.

Boddie-Noell sold "donation dollars" during a four-month drive and donated 5 cents for each order of fries to raise $33,630. In addition, the company's employes helped out both the winter and summer games.

The Special Olympics tie-in was promoted via radio, tv and point-of-purchase materials such as "spare change" cannisters in stores.

The MVP entry blank pointed out that boosting sales was not a primary objective of the promotion, but stores in the Virginia cities of Richmond, Roanoke and Norfolk all reported sales increases.

Other tie-ins with charities among the MVP entrants included the United Way, James Whitcomb Riley Memorial Assn. for handicapped children, National Kidney Foundation, Children of the Scottish Rite Hospital, Mutiple Sclerosis Society and UNICEF. It almost appeared that some of the charity links were an attempt to offset some of the brassiness of "ask for the order" promotions which discounted food or soft drinks.

A winner in the MVP contest in the under-30-stores category was Campbell Hospitality, a unit of Campbell Soup Co., Camden, N.J., for a grand opening promotion for its H.T. McDougal's stores. Schedule Enterprises, Grand Rapids, Mich., operator of Mr. Steak restaurants, offered a collection of 12 "critters"—little clip-on animal premiums—free with soft drink purchases. This won the company an under-30 award.

The third winner in the under-30-stores category was Wendicorp., Miami, a Wendy's franchise; the award came for a civic booster promotion in Miami. For every hamburger sold, the company donated 5 cents to a local civic group to spread a positive image for Miami.

Wendicorp. managed to distribute 250,000 bumper stickers and raise $5,000. The promotion, it was noted by the judges, was particularly interesting because it was fielded in the back yard of Burger King Corp., which has its corporate offices in Miami. In fact, Burger King was rumored to have decided to leave Miami and then embarked on an effort to stem that report.

In the 31-to-100 category, Little King, Omaha, Neb., fielded a "deal of a meal" after announcing it at an employe rally. During this sales meeting, which followed a western theme, employes were given 3,000 coupons each to distribute to friends and new customers at schools, businesses, plants and public buildings. A total of 7.6% of the 975,000 coupons distributed were redeemed, increasing sales by 17%. The employes signed their names on the coupons and were eligible to bid for prizes with the redeemed coupons.

More and more restaurants appeared to be using employes as the focal point of their promotions. These events range from sweepstakes prizes to Walt Disney World to buttons and hats for instore use. Barney Enterprises, Crown Point, Ind., designed a promotion similar to Little King's with coupons distributed by employes, explaining "the basic restaurant business comes from people who are related to or are friends of existing employes."

Another MVP winner, the Taco Time 10-State Advertising Assn., Ogden, Utah, distributed coupons in 49 newspapers in eight states, supported by tv and radio commercials. The purpose of the promotion, which had a theme of "bite off all you can chew," was to build traffic in a down period.

In the 100-plus category, Burger Chef Systems, Indianapolis, went after children with a "funmeal feast" promotion packaged in a plastic sailboat that served as a container premium. The meal of a hamburger, fries, soft drink and dessert was supported with tv and a newspaper ad.

The Krystal Co., Chatanooga, Tenn., used an unusual "rub and win" game to win its award. The "get rich quick" sweepstakes entry was printed on the cardboard packaging for the chain's hamburgers, thereby eliminating the game pieces that are typical in most promotions of this type.

In addition to food and cash prizes, consumers could save five Krystal "K" letters to enter a $100 cash sweepstakes. Radio and tv commercials and four price-off coupons in a newspaper ad gave promotion support.

Other MVP winners in the institutional and hotel categories were Martin Marietta Aerospace, Orlando, Fla.; Motorola Inc., Schaumburg, Ill.; Strathallan Hotel, Rochester, N.Y., and the Hilton Harbor Castle, Toronto.

McDonald's Corp., Oak Brook, Ill., by far the largest in the fast-food category, submitted no entries. However, it is estimated that more than half of its 1982 ad budget will be invested in promotions.

In fact, some analysts believe that McDonald's has invested so much on game promotions that without them, sales increases would be hard, if not impossible, to come by. It has been rumored that McDonald's and other hamburger chains are trying to wean themselves from excessive reliance on games and discounts. AA

Restaurant promotion activity by category

Percent Using	1982	1981	1980
Radio	43%	54%	60%
In-Store materials	62	54	60
Television	17	28	58
Newspaper	45	48	47
Premiums	26	33	40
Self-liquidator	8	17	24
Free	14	16	16
Price Discount	45	16	31
Coupon Discount	27	16	18
Sweepstakes	18	30	20
Crew Incentives	34	NR	NR
Publicity	24	20	NR
Charity Tie-In	34	13	NR
Other Tie-In	17	31	29
Direct Mail	23	13	NR
New Product Intro	7	21	NR

Source: Pepsi Cola Most Valuable Promotions entrants

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Advertising pages in June consumer publications

Current and June '81 figures for U.S., Canadian and foreign publications reporting to Advertising Age

Women's

	Pages June 1982	Pages June 1981	Pages Jan.-June 1982	Pages Jan.-June 1981
†§Bride's Magazine	251.7	212.1	858.0	829.3
▲Co-ed	31.5	36.6	185.6	201.2
§Cosmopolitan	195.7	199.0	1,144.8	1,159.6
Essence	71.0	82.0	465.6	474.9
§Family Circle	122.6	116.0	777.0	760.2
§Good Housekeeping	185.5	169.4	967.8	979.1
▲Health	21.1	23.1	167.3	167.6
Ladies' Home Journal	74.2	82.6	429.3	494.5
Lady's Circle	8.9	6.2	55.9	62.6
McCall's	81.1	86.1	476.8	567.9
†Modern Bride	—	—	812.8	689.0
Ms.	41.3	39.5	242.1	227.5
○New Woman	—	—	174.9	138.3
§Parents Magazine	77.4	67.6	421.7	374.3
Playgirl	39.8	41.5	244.4	266.7
Redbook	96.6	100.7	531.0	566.6
Self	71.8	69.2	414.7	395.8
Seventeen	96.9	102.4	607.8	616.8
Soap Opera Digest	15.0	10.0	131.0	45.0
'Teen Magazine	50.0	36.7	269.8	251.9
§True Story	49.2	46.5	380.0	378.7
§Woman's Day	98.9	102.8	669.5	676.9
▲The Workbasket	24.9	24.8	213.4	200.1
Working Woman	70.3	59.5	469.0	354.1
Total Group	1,775.4	1,714.3	11,140.2	10,878.6
*** % change 1982 vs. 1981	+4.0%		+2.4%	

General

▲A.D. Magazine	11.3	12.5	78.6	91.6
Air Progress	22.4	18.1	111.9	107.7
▲American Film	21.8	16.5	120.7	122.5
American Forests	6.2	0.3	60.3	74.8
American Legion	22.2	21.9	191.1	159.5
American Photographer	51.2	43.1	272.8	237.2
○American West	—	—	73.0	79.3
○Americana	—	—	94.5	89.7
§The Atlantic	32.8	30.3	163.3	161.8
○Audubon Magazine	—	—	94.6	89.2
BBI Jewish Monthly	24.7	23.1	147.2	133.9
§Bon Appetit	75.8	97.7	470.3	504.9
Changing Times	38.4	19.7	224.9	171.3
Christian Herald	31.8	36.0	93.3	101.3
Christian Life	24.5	26.7	164.2	159.5
▶Christianity Today	35.6	49.7	376.8	411.2
Circus	35.2	27.3	172.8	99.6
Complete Men's Group	23.0	22.7	134.8	128.5
Country Journal	31.8	36.8	253.4	252.3
Creative Computing	126.6	102.4	698.8	532.4
D. Cuisine Magazine	42.1	41.8	254.6	209.2
Dance Magazine	52.0	51.8	391.8	394.0
Discover	33.2	23.7	206.1	187.9
Ebony	86.0	87.2	485.3	480.4
▲Elks Magazine	17.6	19.4	139.0	142.8
§Esquire	62.5	46.3	327.5	199.5
Fifty Plus	23.0	31.8	174.4	204.2
Flying	56.7	64.7	281.5	276.5
○Games	—	—	77.1	61.7
§Gentlemen's Quarterly	102.0	94.7	560.1	564.1
Geo	11.8	14.0	98.2	122.0
Golf Digest	80.0	77.1	465.5	486.4
Gourmet	65.1	67.1	395.7	377.3
§Harper's Magazine	17.2	26.6	96.8	141.7
High Fidelity	33.2	39.5	211.4	240.7
High Technology	59.1	—	121.9	—
▲Income Opportunities	46.9	51.7	291.4	299.0
#Inside	—	—	127.7	119.1
Kiwanis Magazine	13.9	14.3	86.8	87.9
Let's Live	70.1	89.6	451.4	520.6
Life	49.5	65.2	302.8	338.1
Lion	6.7	9.0	38.2	32.3
Modern Photography	126.9	127.9	704.5	702.8
§Money	121.7	102.6	643.5	574.1
Moneysworth	12.0	15.4	92.3	94.2
Moody Monthly	34.8	38.7	304.6	330.1
Moose Magazine	16.0	19.0	125.0	119.0
○Mother Earth News	—	—	155.0	156.6
○Museum	45.3	29.3	134.0	103.3
Musician, Player & Listener	55.3	57.7	314.6	294.1
National Geographic	28.6	36.4	137.7	180.9
Natural History	24.6	24.4	182.2	210.4
§Omni	59.0	64.0	325.0	310.0
§Penthouse	59.5	63.3	364.4	384.5
Petersen's Photographic	51.2	47.9	262.7	264.8
Playbill	53.5	53.6	321.7	310.5
§Playboy	132.9	141.6	650.6	685.5
Popular Photography	134.1	146.9	770.6	809.9
Prevention	64.3	79.7	410.5	515.4
Psychology Today	34.3	51.2	223.6	285.0
§Reader's Digest	90.4	100.7	508.5	558.2
Rotarian	12.9	15.3	86.2	86.1
††Saturday Evening Post	50.0	45.6	191.8	182.7
Science Digest	28.7	27.8	175.4	164.3
◊Science 82	22.9	29.1	156.8	191.8
Scientific American	60.9	100.3	451.0	520.4
Signature	52.6	45.6	327.2	300.6
Smithsonian	66.6	73.2	461.5	463.6
Stereo Review	60.2	66.0	313.3	335.1
Success	31.7	29.0	163.0	166.7
Technology Illustrated	56.8	—	171.5	—
Tennis	74.9	81.8	384.0	381.9
Town & Country	113.6	116.0	755.2	696.0
Travel	36.1	44.5	311.3	313.1
Travel & Leisure	71.4	110.1	564.9	567.3
▲V.F.W.	22.6	—	167.2	—
Video	60.1	56.8	317.7	306.1
Video Review	54.0	44.5	365.3	283.2
Weight Watchers	33.8	24.8	168.5	140.6
World Tennis	49.1	53.4	250.4	277.0
Writers Digest	18.9	20.7	138.2	127.1
Yankee	67.8	62.8	451.0	455.3
Total Group	3,607.6	3,629.0	21,941.0	21,261.7
*** % change 1982 vs. 1981	−0.6%		+3.2%	

Fashion & service

Glamour	128.4	168.9	910.6	1,022.5
Harper's Bazaar	70.2	64.9	611.5	547.2
Mademoiselle	97.6	88.0	683.6	702.3
Vogue	139.4	121.4	1,195.5	1,039.6
Total Group	435.6	443.2	3,401.2	3,311.6
*** % change 1982 vs. 1981	−1.7%		+2.7%	

Art & antiques

American Artist	46.3	46.4	353.2	337.5
Antiques	137.9	135.9	914.8	932.7
○Art & Antiques	50.9	58.1	166.3	172.5
▲Art in America	104.0	119.0	669.8	659.5
▲Artnews	102.0	148.0	626.2	730.0
○Portfolio	—	—	189.8	128.0
Southwest Art	123.0	120.6	692.0	673.6
Total Group	564.1	628.0	3,612.1	3,633.8
*** % change 1982 vs. 1981	−10.2%		−0.6%	

Home

§Architectural Digest	138.8	118.0	770.8	747.5
§Better Homes & Gardens	139.9	107.0	664.8	701.4
○Colonial Homes	65.4	63.6	188.9	163.8
C. ▲Country Living	29.3	27.4	204.0	96.8
Dallas-Fort Worth Home/Garden	76.3	51.6	323.6	218.2
▲Family Handyman	—	—	357.0	281.9
○Flower & Garden	38.5	34.2	157.7	144.3
Home	20.7	27.9	157.4	183.7
†Homeowner's How-To	24.4	37.5	79.7	97.8
Houston Home/Garden	128.6	98.7	655.9	548.3
Horticulture	31.3	22.0	190.6	153.2
House Beautiful	62.5	80.9	455.5	531.5
House & Garden	80.2	100.1	540.9	629.5
Metropolitan Home	63.5	67.5	372.1	331.8
††New Shelter	—	—	192.8	197.4
E. 1001 Home Ideas	27.1	43.1	167.8	174.7
Organic Gardening	50.7	57.5	439.3	457.7
Phoenix Home/Garden	42.2	39.1	294.2	198.5
San Diego Home/Garden	45.5	41.2	322.2	254.2
#Southern Accents	—	—	161.5	157.8
Southern Living	128.4	138.7	781.5	732.1
§Sunset Magazine	147.1	163.3	842.6	852.8
▲Texas Homes	78.1	71.2	453.6	402.7
○Workbench	—	—	190.2	190.7
Total Group	1,329.2	1,361.1	8,760.6	8,331.5
*** % change 1982 vs. 1981	−2.3%		+5.2%	

In-flight & other passenger

#Aboard Group (7)	—	—	616.0	480.0
Air Cal	54.0	61.8	316.7	350.5
○Alas Group (9)	36.0	30.0	92.0	75.9
Alaskafest	39.2	46.3	232.9	222.8
American Way	83.2	65.0	411.5	348.7
East/West Network:				
Amtrak Express	46.5	41.3	236.5	199.0
Continental Extra	66.3	54.2	330.1	304.5
Eastern Review	85.8	81.2	479.8	472.8
Ozark Flightime	51.0	49.0	255.0	269.0
PSA Magazine	94.8	98.0	512.1	521.0
Republic Scene East	58.3	54.5	300.1	287.7
Republic Scene West	64.2	63.5	321.1	341.0
Texas International/-The Texas Flyer	78.9	64.2	380.5	326.0
United Mainliner	89.0	79.8	450.1	486.2
USAir	51.2	46.3	252.3	216.5
Halsey Publications:				
Delta Sky	52.6	45.0	296.6	272.0
○Skylite	—	—	32.3	21.8
Hawaii	16.2	25.4	129.0	172.8
○Pace	—	—	86.8	112.9
Pan Am Clipper	36.3	67.6	225.1	344.0
Southwest Airlines	91.7	80.0	558.0	454.3
Spirit of Aloha	16.3	25.4	129.1	172.8
Webb Publications:				
Frontier	45.8	35.5	241.9	204.8
Passages	34.3	27.2	186.1	161.5
TWA Ambassador	62.0	44.8	277.8	270.5
Total Group	1,211.6	1,456.0	8,177.4	7,752.1
*** % change 1982 vs. 1981	−16.8%		+5.5%	

Metropolitan

○Aloha	29.0	24.3	85.5	67.3
Atlanta	61.0	77.7	388.9	482.1
Baltimore	60.0	60.9	348.6	363.2
Boston	113.3	119.8	695.5	700.4
California	81.2	70.7	416.3	352.2
D. Charlotte	22.0	—	112.0	—
Chicago	134.2	136.4	809.0	765.9
Chicago's North Shore	63.1	68.0	357.1	352.6
Cincinnati	55.8	58.9	327.7	310.5
Cleveland	62.5	63.3	340.1	437.8
Coast	308.5	355.6	1,390.3	1,437.3
Columbus Monthly	73.6	84.1	432.9	516.0
Commonwealth	63.5	22.0	421.2	79.8
Connecticut	81.5	69.5	448.9	398.8
D/Magazine, Dallas/Fort Worth	121.7	121.4	637.3	657.1
Denver	39.5	53.4	234.2	294.0
Monthly Detroit	58.8	31.7	319.5	246.9
Exclusively Yours Wisconsin	62.8	60.8	412.8	486.3
Grand Rapids	44.3	46.3	242.1	234.2
††Gulfshore Life	64.5	83.0	466.5	433.0
Honolulu	73.0	73.5	389.1	411.8
Houston City	71.8	81.8	395.5	369.2
Indianapolis	40.6	47.8	341.2	290.3
Kansas City	23.0	18.1	148.2	107.0
Los Angeles	184.3	187.0	1,121.8	1,099.5
○Louisiana Life	—	—	937.5	912.5
Madison	47.0	60.0	278.7	272.0
Miami	95.6	110.6	551.6	512.6
Milwaukee	22.7	27.7	163.3	168.7
Mpls./St. Paul	56.4	56.3	407.2	429.2
Nashville	38.6	59.0	236.5	421.8
New Jersey Monthly	78.1	69.8	334.6	392.2
New Mexico	35.5	25.8	165.0	125.1
Ohio	49.6	33.9	201.6	186.7
Omaha	15.9	19.0	115.6	98.9
Oregon	32.7	31.6	125.7	148.8
Orlando	60.0	80.2	410.0	430.5
▲Pacific Northwest	27.9	18.3	145.4	60.3
Palm Beach Life	36.3	43.7	536.3	528.0
Palm Springs Life	80.5	76.3	782.2	773.7
Philadelphia	110.0	116.6	700.6	781.1
Phoenix	61.4	83.5	474.4	519.3
Pittsburgh	61.5	36.3	278.9	225.2
St. Louis	69.7	64.3	391.5	403.0
San Diego	121.1	128.8	757.3	829.3
San Francisco	43.5	57.9	287.1	335.5
○San Francisco Bay Views	43.3	34.5	151.0	198.5
San Francisco Focus	40.0	40.2	223.4	217.8
†Shenandoah Valley	—	—	91.0	69.4
Tampa	34.6	20.4	201.1	152.4
Tampa Bay	34.8	47.3	199.1	247.1
Texas Monthly	141.7	166.0	752.6	789.5
Twin Cities	41.9	45.1	270.0	272.6
Washington Dossier	40.3	35.3	237.3	267.3
The Washingtonian	125.0	140.5	774.0	761.1
Westchester	30.7	37.7	189.8	210.0
Westchester Illustrated	39.0	41.5	224.4	212.8
Total Group	3,490.5	3,669.1	22,705.9	21,946.1
*** % change 1982 vs. 1981	−4.9%		+3.5%	

Movie-romance-radio-tv

Ideal Women's Group:				
Daytime Stars	15.4	24.8	61.9	134.5
○Intimate Story	18.8	22.2	119.0	157.6
Soap Opera	15.4	24.8	61.9	134.5
Macfadden's Women's Group:				
Modern Romances	25.1	25.6	165.9	175.5
Secrets	25.1	25.6	165.9	175.5
True Confessions	26.6	26.9	174.0	185.7
True Experience	25.1	25.6	165.9	175.5
True Love	25.1	25.6	165.9	175.5
True Romance	25.1	25.6	165.9	175.5
Sterling Women's Group:				
Daytime TV	31.5	32.2	182.2	192.2
Modern Screen	32.5	32.8	132.3	132.5
○Movie Mirror	—	—	66.5	97.1
Photo Screen	—	33.5	64.5	100.0
Soap Opera Stars	25.3	25.3	126.5	179.5
TV Movie Screen	—	—	67.6	97.1
TV Picture Life	32.5	32.8	99.1	99.3
○Teen Bag	—	—	18.5	24.4
Total Group	372.7	429.8	2,383.5	2,790.6
*** % change 1982 vs. 1981	−13.3%		−14.6%	

Youth

Boys' Life	20.0	18.8	115.7	127.5
Campus Life	24.7	16.7	230.3	218.0
Total Group	44.7	35.5	346.0	345.5
*** % change 1982 vs. 1981	+2.6%		+0.1%	

Mechanics & science

§Mechanix Illustrated	62.2	61.0	410.7	441.4
Popular Electronics	51.7	55.1	349.3	354.2
Popular Mechanics	110.7	109.6	636.2	659.8
§Popular Science	58.5	48.9	575.3	525.9
Total Group	283.1	274.6	1,971.5	1,981.3
*** % change 1982 vs. 1981	+3.1%		−0.5%	

Boating & yachting

Boating	103.3	108.1	724.8	749.3
Chesapeake Bay	27.0	28.3	157.2	157.6
Cruising World	118.0	108.2	760.2	707.7
Lakeland Boating	45.7	49.0	314.1	299.5
Motor Boating & Sailing	113.3	123.3	871.2	870.3
Rudder	24.4	30.7	144.6	143.7
Sail	141.1	132.7	952.6	895.2
Sea & Pacific Skipper	69.0	82.8	455.8	490.4
Trailer Boats	19.9	23.8	165.0	159.5
Yachting	146.3	177.2	1,101.7	1,178.2
Total Group	808.0	864.1	5,647.2	5,651.4
*** % change 1982 vs. 1981	−6.5%		−0.1%	

Automotive & recreational vehicles

Car & Driver	92.9	90.1	479.4	514.7
Car Collector & Car Classics	22.1	27.7	128.4	137.3
Car Craft	108.5	76.4	470.1	391.3
Cycle	80.3	87.4	570.0	580.9
Cycle Guide	64.8	56.9	390.8	400.2
Cycle World	71.9	62.5	469.2	517.2
Dune Buggies & Hot VWs	57.8	44.2	309.8	238.4
Family Motor Coaching	90.7	63.0	570.6	363.1
4 Wheel & Offroad	82.1	41.4	297.9	217.6
Four Wheeler	29.6	28.2	165.6	149.3
Hot Rod	77.5	59.2	383.6	346.7
Motorcyclist	63.8	64.0	392.3	383.9
Motor Trend	80.9	60.9	352.9	326.7
††Motorhome	79.9	50.7	365.8	228.1
Pickup, Van & 4 WD	30.7	—	159.7	—
Road & Track	134.8	110.9	565.2	568.8
3 Wheeling	26.5	27.0	120.4	86.8

*** % change figured ONLY from magazines with comparable issues 1982 AND 1981. §Sectional linage included but prorated to circulation of regional editions. *Sectional linage included but not prorated to circulation of regional editions. †Published 6 times a year. ○Published every other month. ▲Published 10 times a year. ††Published 9 times a year. ‡Published 3 times a year. #Published quarterly. ☆Published twice a month. ‡‡Published 7 times a year. ◊Published 11 times a year. ▼Published 8 times a year. **Published weekly. ▶Published every two weeks. A. Combined unduplicated regional ads. B. Preprinted inserts included. +Affiliated with Sunday Mag./Net. C. Monthly as of Feb. '82. D. Monthly as of Jan. '82. E. Combined June/July figures.

(Continued on Page 66)

Advertising pages in June consumer publications

(Continued from Page 65)

	Pages			
	June 1982	June 1981	Jan.-June 1982	Jan.-June 1981
Trailer Life	120.7	97.3	625.1	521.0
Total Group	1,315.5	1,047.8	6,816.8	5,972.0
*** % change 1982 vs. 1981	+25.5%		+14.1%	
Outdoor & sport				
Alaska	42.5	40.5	278.2	230.0
○The American Handgunner	38.0	38.5	110.1	110.9
American Hunter	15.6	9.9	75.5	58.2
American Rifleman	26.4	26.3	157.8	158.9
○Backpacker	45.8	43.2	137.9	124.3
▼§Bass Master	—	—	331.6	224.0
††Bicycling	94.2	81.1	431.8	369.7
Field & Stream	77.6	74.0	496.9	501.5
§Fins and Feathers	35.7	25.6	257.6	201.7
○Fishing World	—	—	133.6	116.5
Florida Sportsman	64.5	65.1	447.5	438.6
Fur-Fish-Game	18.5	20.0	140.5	140.9
Guns	24.3	35.8	184.1	194.3
Guns & Ammo	51.9	39.8	271.0	275.4
Outdoor Life	67.5	63.1	423.0	446.3
Petersen's Hunting	35.7	28.4	175.8	147.6
The Runner	37.3	22.2	201.3	135.6
Salt Water Sportsman	58.5	63.1	398.1	411.8
Shooting Times	37.1	34.7	179.1	226.3
‡‡§Ski	—	—	224.4	196.1
‡‡Skiing	—	—	197.6	160.0
Skin Diver	76.3	71.5	396.3	353.5
‡‡Southern Outdoors	—	—	208.8	193.3
§Sport	42.9	38.5	232.1	208.9
Sports Afield	85.4	82.0	567.0	518.0
▲Spray	57.2	54.7	240.4	193.3
▲Western Outdoors	28.7	29.3	210.2	201.7
Total Group	1,061.6	987.3	7,108.2	6,535.3
*** % change 1982 vs. 1981	+7.5%		+8.8%	
Comics				
○Archie Comic Group	10.0	10.0	30.0	30.0
DC Comics	6.5	7.5	41.5	50.0
Harvey Comic Group	8.0	8.0	48.0	48.0
Marvel Comic Group	10.0	10.0	60.0	58.0
Total Group	34.5	35.5	179.5	186.0
*** % change 1982 vs. 1981	−2.8%		−3.5%	
Newspaper Sunday magazines/national				
§Family Weekly	57.5	64.6	455.4	527.7
Parade	59.1	53.9	396.0	431.7
Total Group	116.6	118.5	851.4	959.4
*** % change 1982 vs. 1981	−1.6%		−11.3%	
Canadian national weekend magazines				
B. Perspectives	30.1	36.8	214.4	240.0
§Today	24.5	47.7	241.9	323.0
Total Group	54.6	84.5	456.3	563.0
*** % change 1982 vs. 1981	−35.4%		−19.0%	
Canadian				
L'Actualite	59.7	71.2	342.1	333.7
Chatelaine:				
§English Edition	84.0	92.5	518.0	506.6
French Edition	66.7	80.5	425.7	443.5
§Financial Post Magazine	30.6	27.1	227.9	245.0
§Flare	54.0	60.1	286.5	321.2
§▲Homemaker's Magazine:				
English Edition	72.3	70.2	420.1	415.3
French Edition	64.0	51.3	326.5	307.2
§Macleans	101.5	95.0	672.1	596.5
▼§Quest Magazine	—	—	191.4	167.0
§Reader's Digest:				
Canada-English	81.8	72.8	520.2	565.7
Canada-French	82.0	53.5	535.0	535.4
Toronto Life	102.0	107.0	616.0	546.0
Total Group	798.6	781.2	5,081.5	4,985.1
*** % change 1982 vs. 1981	+2.2%		+1.9%	

May

	Pages			
	May 1982	May 1981	Jan.-May 1982	Jan.-May 1981
Business				
Atlanta Business Chronicle	36.1	32.8	123.3	136.0
Barron's	206.9	191.1	910.3	916.6
Black Enterprise	46.6	30.1	192.8	206.9
§Business Week	483.8	466.6	1,893.5	1,914.7
California Business	128.1	122.3	377.1	311.8
Corporate Report/-Kansas City	61.5	44.6	256.0	232.2
Corporate Report/Minnesota	87.7	103.9	373.6	402.0
Crain's Chicago Business	134.5	89.9	500.1	399.4
Dallas/Fort Worth Business	42.6	40.1	212.7	185.2
Dun's Business Month	73.0	92.0	351.0	374.0
☆Financial World	97.2	105.4	402.5	408.2
Florida Trend	59.3	50.8	384.2	323.2
▶Forbes	294.7	308.8	1,183.9	1,122.9
▶§Fortune	406.8	330.6	1,099.5	957.4
Hawaii Business	47.2	67.8	213.9	269.3
Houston Business Journal	228.5	163.4	934.2	679.7
§Inc. Magazine	115.3	105.6	422.4	407.3
▶§Industry Week	154.2	150.9	625.8	673.7
Indianapolis Business Journal	74.5	53.2	333.4	249.7
§Nation's Business	42.5	49.7	197.3	222.7
*New England Business	56.6	47.0	304.7	198.7
St. Louis Business Journal	111.7	73.8	486.6	325.3
Texas Business	50.5	37.1	269.8	199.9
Venture	43.3	39.7	194.9	178.3
Total Group	3,083.1	2,797.2	12,243.1	11,086.1
*** % change 1982 vs. 1981	+10.2%		+10.4%	
Newspaper Sunday magazines/local				
+Arizona Republic	116.3	126.6	512.9	615.0
+Boston Globe	203.9	221.6	827.3	815.3
+Chicago Tribune	119.1	127.7	466.3	568.3
+Cincinnati Enquirer	83.6	132.6	390.9	519.7
+Cleveland Plain Dealer	83.6	124.0	362.4	520.5
+Columbus Dispatch	64.0	100.7	291.1	456.4
+Dallas Times Herald	87.9	102.3	381.3	444.0
+Denver Post	126.5	237.2	667.6	903.7
+Detroit News	116.6	147.7	472.4	637.7
Los Angeles Times Home Magazine	111.4	137.9	465.6	580.1
+Louisville Courier-Journal	100.5	118.1	475.4	532.2
+Miami Herald	69.6	108.9	339.5	457.7
+New York News	55.8	116.7	278.4	496.3
New York Times Magazine	321.7	383.7	1,720.5	1,805.0
+Philadelphia Inquirer	79.2	100.6	341.7	394.5
+Toledo Blade Magazine	64.2	88.3	243.3	321.5
+Washington Post	154.5	190.2	576.7	680.2
Total Group	1,958.4	2,564.8	8,815.3	10,748.1
*** % change 1982 vs. 1981	−23.6%		−18.0%	
Weeklies, bi-weeklies, semi-monthlies				
The Advocate	95.4	83.8	351.9	308.0
§Army Times Military Group:				
Air Force Times	170.2	145.8	723.5	703.7
Army Times	169.0	145.2	713.6	698.4
Navy Times	200.4	163.8	852.0	805.6
The Times Magazine	5.1	10.8	74.0	89.9
AutoWeek	172.5	143.2	676.0	575.4
The Blood-Horse	287.8	207.9	2,261.3	1,975.6
Capper's Weekly	20.3	18.1	131.6	132.1
Commonweal	7.4	11.2	85.3	41.8
Golf World	80.8	90.1	364.8	382.5
§Grit	29.6	21.8	136.2	127.6
National Review	35.0	35.2	144.8	139.1
New Republic	31.8	37.2	138.2	116.9
New York Magazine	264.1	231.0	977.6	878.2
New Yorker	403.3	365.2	1,678.7	1,590.5
§Newsweek	297.6	274.7	1,115.8	1,224.8
People	381.3	377.1	1,438.2	1,445.3
Rolling Stone	93.2	78.3	438.7	395.1
Sporting News	60.5	61.8	284.3	259.6
§Sports Illustrated	312.2	261.6	1,118.4	1,120.0
§Time	285.4	243.6	1,091.5	1,116.0
A. Travelhost	2,827.0	2,208.6	11,723.3	9,911.0
§TV Guide	359.2	357.2	1,624.3	1,630.8
▶Us Magazine	52.7	40.8	234.3	160.0
§U.S. News & World Report	185.8	182.3	714.4	705.5
Total Group	6,827.6	5,776.3	29,092.7	26,531.4
*** % change 1982 vs. 1981	+18.2%		+9.7%	
Foreign				
Buenhogar:				
Ecuador	7.0	12.7	43.0	42.3
Chile	2.5	4.0	10.2	13.0
Mexico	90.2	75.2	315.8	299.7
Puerto Rico	16.8	24.8	87.5	101.5
Venezuela	43.2	55.3	184.8	195.5
Colombia	58.5	52.3	216.0	193.5
Peru	28.0	32.7	151.0	152.8
Central America	2.0	11.7	17.5	35.5
U.S.	6.0	7.2	28.0	36.2
Dominican Republic	18.0	92.7	75.8	50.7
Coqueta:				
Mexico	9.3	7.0	44.3	28.5
Puerto Rico	3.0	1.0	10.0	7.5
Venezuela	6.0	6.5	27.0	29.0
Colombia	5.0	1.0	23.5	14.5
Peru	—	—	5.0	—
Central America	—	—	5.0	1.0
Fascinacion:				
Mexico	10.0	7.5	33.7	34.5
Puerto Rico	2.0	1.0	8.5	6.0
Venezuela	21.5	7.7	62.7	44.2
Colombia	10.0	9.0	40.0	31.7
Central America	—	—	—	1.0
Geomundo:				
Chile	10.0	9.7	28.0	28.7
Mexico	21.5	18.5	61.5	58.5
Ecuador	7.0	7.0	23.0	20.0
Venezuela	20.0	17.7	72.5	58.2
Colombia	17.5	13.5	56.0	48.0
Peru	12.0	12.0	41.0	41.0
Puerto Rico	8.0	7.7	31.0	23.7
Central America	11.0	7.7	27.0	22.7
Hombre De Mundo:				
Dominican Republic	—	—	—	—
Mexico	35.8	34.5	97.0	84.0
Chile	8.7	10.0	24.8	30.0
Puerto Rico	13.3	20.3	37.0	58.3
Ecuador	5.7	9.0	22.7	28.0
Venezuela	68.8	21.5	143.2	75.5
Colombia	22.5	19.2	59.0	62.3
Peru	12.7	14.0	28.7	44.0
Central America	10.2	13.0	23.2	35.0
Ideas Para Su Hogar:				
Dominican Republic	—	4.0	3.0	14.5
Mexico	38.0	32.3	132.5	90.0
Chile	2.0	2.0	4.0	6.0
Puerto Rico	1.3	4.2	6.0	10.0
Ecuador	6.8	1.5	28.8	4.0
Venezuela	44.0	22.0	121.3	77.8
Colombia	35.8	34.3	105.8	92.7
Peru	19.0	12.0	57.0	43.0
Central America	1.0	2.5	6.0	5.5
Intimidades:				
Mexico	7.0	4.5	28.5	23.0
Puerto Rico	2.0	3.0	14.0	17.5
Venezuela	6.0	10.5	32.0	53.0
Colombia	1.0	2.0	8.0	10.5
Central America	1.0	2.0	8.0	7.0
Chile	—	—	2.0	2.0
Mecanica Popular:				
Mexico	22.5	33.3	106.3	125.2
Puerto Rico	16.8	20.7	73.3	97.5
Venezuela	26.7	30.8	120.3	127.2
Colombia	24.8	26.7	103.5	115.5
Peru	25.8	30.7	107.8	128.5
Central America	19.2	20.3	79.7	94.2
Chile	6.2	4.0	28.3	21.8
Argentina	9.8	10.5	41.2	55.7
The Ring en Espanol				
Mexico	2.0	2.0	10.0	8.0
Puerto Rico	4.0	2.0	17.5	11.0
Venezuela	3.0	3.0	15.0	11.0
Colombia	—	—	—	—
Central America	—	—	—	—
U.S.	7.5	2.0	24.5	11.0
Vanidades Continental:				
Dominican Republic	35.5	31.5	159.8	120.7
Mexico	147.0	151.8	601.2	588.5
Chile	14.0	20.0	67.0	68.8
Puerto Rico	47.3	46.7	230.5	252.5
Venezuela	93.5	81.8	406.5	332,3
Colombia	102.5	90.5	337.3	331.2
Peru	37.3	46.2	189.0	188.5
Central America	17.7	31.7	84.2	120.2
Ecuador	19.3	28.7	87.2	107.7
U.S.	67.5	42.2	266.0	175.0
Cosmopolitan Foreign Editions:				
Australia	75.9	60.1	279.2	251.5
Brazil	62.0	45.6	190.6	149.5
France	175.3	139.5	512.6	447.8
Germany	36.0	17.0	120.0	62.0
Great Britain	148.0	153.0	479.0	487.0
Greece	71.0	20.0	269.0	205.0
Holland	28.0	—	87.0	—
Italy	105.2	90.3	298.6	286.8
Japan	43.0	—	177.6	73.0
Cosmopolitan en Espanol:				
Central America	5.7	8.3	20.5	30.7
Colombia	27.0	23.0	88.7	87.5
Ecuador	5.2	2.5	19.0	13.8
Mexico	96.3	90.8	344.0	290.0
Peru	17.0	16.0	76.8	68.5
Puerto Rico	39.3	56.2	134.5	161.0
U.S. (Spanish language)	21.2	11.7	86.8	67.7
Venezuela	47.2	33.2	159.8	118.3
International Communications:				
African Business	24.3	40.6	159.9	133.7
The Middle East	16.9	18.6	92.3	94.2
New African	30.5	15.8	125.9	127.2
Al-Iktissad Al Arabi	3.5	13.0	28.3	50.3
International Herald Tribune	111.0	96.5	444.3	431.7
International Management:				
Africa	14.7	16.5	73.5	65.3
Europe	67.7	53.8	199.2	194.3
Latin America	15.5	15.5	60.3	74.7
Middle East	16.0	17.0	83.8	71.7
Pacific	33.3	19.5	93.2	66.3
Johnston International:				
Alam Attijarat	67.5	72.8	303.5	296.7
Modern Africa	39.0	30.3	102.7	100.6
Modern Asia	58.0	80.1	175.6	219.6
§Newsweek International:				
Atlantic	126.6	95.7	423.2	400.0
Latin America	34.3	36.4	124.0	140.1
Pacific	92.6	87.8	342.5	351.1
††Progreso	18.5	17.6	35.3	51.8
Reader's Digest:				
Asia	180.0	209.5	930.5	752.9
Australian	75.0	70.0	319.5	414.3
Belgian-Flemish	116.5	161.0	412.0	442.0
Belgian-French	84.5	115.5	322.5	345.0
British	66.2	61.7	280.2	288.1
Chinese	93.0	120.5	416.5	445.8
Danish	34.3	37.8	203.1	186.8
Dutch	44.5	55.3	204.8	234.7
Finnish	82.5	64.0	300.8	322.8
French	100.0	112.9	368.0	379.3
German	91.4	93.9	379.0	376.7
Greek	9.0	—	49.5	—
Iberian	29.5	72.5	134.5	224.5
Indian-English	105.0	82.5	451.5	503.5
Indian-Hindi	36.0	—	91.5	—
Italian	95.0	68.0	280.5	331.5
Japanese	44.8	50.4	225.2	219.2
Korean	21.3	20.5	95.2	79.5
Latin American:				
Argentine	22.5	29.5	75.0	121.0
Brazil	10.0	10.5	52.8	51.6
Central American	12.5	19.0	59.0	76.5
Chile	16.5	28.0	76.5	133.5
Colombia	37.0	46.5	133.0	206.5
Ecuador	9.5	14.5	51.5	58.0
Mexico	111.0	64.2	297.6	262.2
Peru	10.5	14.0	49.0	55.0
Puerto Rico	10.0	11.0	43.0	41.0
U.P.B.	15.0	27.0	63.5	120.0
U.S. Spanish	16.5	19.5	85.5	95.0
Venezuela	24.5	21.5	97.5	99.0
Portugal	48.0	58.0	180.3	196.5
New Zealand	61.0	64.0	278.0	207.2
Norwegian	58.8	53.3	230.6	201.8
South African	112.5	91.0	446.5	376.5
Swedish	26.0	29.8	143.0	120.9
Swiss-French	47.0	51.0	156.0	171.0
Swiss-German	55.0	66.0	207.0	223.0
Time International:				
Time-Asia	123.2	106.1	429.2	431.9
Time-Atlantic	147.6	116.9	520.3	491.0
Time-Canada	201.4	158.3	788.3	697.1
Time-Latin America	86.3	88.1	310.2	317.7
Time-South Pacific	173.4	142.0	643.8	616.3
**Visao	215.5	125.5	696.2	482.5
▶§Vision/Latin America	47.2	44.4	168.0	171.2
Total Group	6,320.6	5,928.8	23,859.2	19,617.0
*** % change 1982 vs. 1981	+6.6%		+21.6%	

Wine sales grow 5.8% in '81, but imports do better

By JOHN C. MAXWELL JR. and DONNA M. MATTEI

Wine industry sales in 1981 grew 5.8% from 1980. As had been the case in the past few years, imported wines outpaced the domestics' growth; imports grew 11.9% and domestic wines increased 4.3%. Total shipments for 1981 pushed annual per capita consumption to 2.4 gallons.

During 1981, white wines continued to cannibalize the market share of reds and rosés. White wines' share rose to about 60% from 55% in 1980. Reds, on the other hand, fell from 25% in 1980 to 22% in 1981, and rosés slipped to 18% from 20%.

The reasons for the increase in white wines' popularity remain unchanged: White wine is a versatile and refreshing drink, and the U.S. is a young wine consuming nation and white wines are an easier beginning to wine enjoyment.

■ With imported wines increasing 11.9% in 1981, they now represent more than one-fifth of U.S. wine sales. Italian wines once again increased their share of U.S. imports, to 58.1%, and their sales grew 12.8%. French wines rebounded in 1981 from the prior year's depressed level. They were highly priced in earlier years, which caused an erosion of share and a decrease in volume. In the past year or so, promotions of these wines have increased and this, coupled with the strong dollar vis-a-vis the French franc, served to boost U.S. demand for French wine—by 33.6%.

The modest 0.4% growth in Spanish wines indicates the declining popularity of Yago Sangria, which represents most Spanish wine in the U.S.

On the domestic front, E.&J. Gallo retained its No. 1 position, followed by United Vintners, Almaden, Wine Spectrum and Franzia Brothers, in that order. Although Gallo was up 7.4% from 1980, United Vintners and Almaden were down, 3.9% and 5%, respectively. The largest percentage gains in 1981 were Franzia Brothers' rise of 26.2% and F. Korbel's 26%.

The only change in position within the top 10 sellers were between Canandaigua and Monarch, who changed positions, with Canandaigua going from No. 9 to No. 7 and Monarch doing the reverse.

Both domestic and imported wine sales reflected a continuing popularity of still and effervescent wines. The decline in natural wines (including sangrias) and vermouth continued last year.

■ In 1981, the export of U.S. wine saw tremendous growth—more than 40%. Total exports represented slightly more than 1% of domestic output in 1980 and jumped to 2.2% last year. This tells us that the quality of U.S. wines is recognized abroad, and we see no reason for this trend to stop.

The most important new trend in the wine industry is the introduction of light wines. Light wines are made from grapes that are harvested before they would be if full-flavored wines were sought. Although this decreases the sugar content, it also decreases the flavor. Because of this, we believe that until technology is developed to improve the flavor, the consumer segment for these wines will be beginning drinkers.

In addition, although we recognize that there is a niche in the industry for light wines, we believe the potential is not as great as the light beer and diet soda markets. Our basic reasons are that wines are already perceived as low in calories, and wines are viewed as a classical beverage; light wines may not measure up to that image.

We expect light wines to capture 5% to 10% of the industry over the next few years.

The first quarter of 1982 saw some softening in the U.S. wine industry. We see this as a result of the current recession, which, depending on the timing of a recovery, may produce a flat to slightly up year for the industry.

For the longer term, we continue to expect industry growth in the area of 4% to 6% per year, with premium wines outpacing that rate of growth.#

Mr. Maxwell and Ms. Mattei are with Lehman Brothers Kuhn Loeb, New York.

U.S. wine market: Sales and shares

Rank 1980	Rank 1981	Company	1979 mil. gal.	1979 (%)	1980 mil. gal.	1980 (%)	1981 mil. gal.	1981 (%)	% change 1980-1981
1	1	E.&J. Gallo	111.6	23.1	119.3	23.3	128.2	23.7	7.4
2	2	United Vintners	54.4	11.3	51.9	10.1	49.8	9.2	(3.9)
3	3	Almaden	28.6	5.9	31.7	6.2	30.1	5.6	(5.0)
4	4	Wine Spectrum	15.9	3.3	22.2	4.3	27.1	5.0	22.1
5	5	Franzia Bros.	11.7	2.4	18.2	3.6	22.9	4.3	26.2
6	6	Paul Masson	13.2	2.8	16.3	3.2	16.5	3.1	1.5
9	7	Canandaigua	13.1	2.7	13.6	2.7	15.3	2.8	12.5
8	8	Guild	13.2	2.8	12.3	2.4	13.2	2.5	7.5
7	9	Monarch	12.2	2.5	12.4	2.4	12.6	2.3	1.6
10	10	Sebastiani	9.0	1.9	10.0	2.0	8.5	1.6	(14.5)
12	11	Gibson	3.3	0.7	4.5	0.9	4.6	0.8	3.7
11	12	C. Mondavi	4.9	1.0	5.0	1.0	4.5	0.8	(10.0)
11	13	Christian Bros.	5.1	1.1	5.0	1.0	4.1	0.8	(17.1)
14	14	Beringer	3.5	0.7	3.3	0.6	4.0	0.7	21.5
11	15	Mogen David	6.3	1.3	5.0	1.0	3.5	0.6	(30.0)
15	15	Lamont	2.0	0.4	3.2	0.6	3.5	0.6	9.8
13	16	Bronco	2.9	0.6	3.4	0.7	3.2	0.6	(5.6)
16	17	Giumarra	1.4	0.3	2.2	0.4	2.3	0.4	3.3
17	18	Delicato	1.0	0.2	2.0	0.4	1.9	0.4	(6.3)
18	19	Wente	1.5	0.3	1.7	0.3	1.6	0.3	(2.3)
19	19	Weibel	1.4	0.3	1.6	0.3	1.6	0.3	0.6
20	20	East-Side	1.5	0.3	1.4	0.3	1.3	0.2	(6.9)
20	20	Sonoma	1.4	0.3	1.4	0.3	1.3	0.2	(3.9)
22	21	California Growers	2.1	0.4	1.2	0.2	1.2	0.2	(6.4)
24	21	F. Korbel	0.7	0.1	0.9	0.2	1.2	0.2	26.0
21	22	Robert Mondavi	1.4	0.3	1.3	0.3	0.9	0.2	(32.2)
23	22	Brookside	0.9	0.2	1.0	0.2	0.9	0.2	(6.1)
25	23	Mirassou	0.7	0.1	0.8	0.2	0.8	0.1	(2.6)
22	24	Perelli-Minetti	2.1	0.4	1.2	0.2	0.7	0.1	(38.5)
26	24	Louis Martini	0.8	0.2	0.7	0.1	0.7	0.1	(5.4)
27	25	San Martin	0.7	0.1	0.6	0.1	0.6	0.1	(2.6)
28	26	M&H	0.2	—	0.3	—	0.4	0.1	23.5)
29	27	Pacific Land & Viticulture*	0.1	—	0.2	—	0.2	—	(16.7)
		Subtotal	327.7	67.8	353.2	69.0	369.2	68.1	4.5
		Other Domestic	62.5	13.0	54.3	10.6	58.5	10.8	2.8
		Total Domestic	391.3	81.0	410.1	80.1	427.7	78.9	4.3
		Imports	91.7	19.0	102.1	19.9	114.2	21.1	11.9
		Total	483.0	100.0%	512.2	100.0%	541.9	100.0%	5.8%

*Formerly Concannon Source: Lehman Bros. Kuhn Loeb

Radio spots popping up in Belgium

By JASPER BECKER

BRUSSELS—Media history is being made in Belgium. For the first time ever, commercials are being broadcast on private radio stations in a country that still is refusing to allow commercials to appear on the state-controlled radio and tv networks.

The audacious move by six of the largest *radios libres* (free radio stations), whose growth has mushroomed in Belgium over the past four years, takes advantage of a legal vacuum in a law passed in August, 1981, which for the first time recognized the stations' existence.

The once-outlawed free radios are sticking their necks out, but so far the government has not made any reprisals. An emergency ministerial meeting, called to consider the government's response, has neither approved nor rejected out of hand the demands to allow advertising officially on all electronic media.

■ A constitutional committee has been set up to consider the legal courses open.

The legal loophole arose in the first place because the Flemish and the Walloon regional authorities disagreed in their interpretation of the law that first legalized the free radios. The Francophones claimed the law prohibited advertising, while the Flemish thought it did neither one nor the other. The Council of State then declared that the final conclusion was unclear, due to constitutional irregularities when the law first was drawn up last year.

The lawyers may continue to disagree among themselves, but in effect it is a *fait accompli* now. The government, by its inactivity, has virtually condoned the move by the free radios to assert their financial independence.

Only the head of RTBF (the national tv network) truly is outraged and is threatening to take the free radios to court. He is backed by the Socialist parties in Belgium, but tacitly opposed by the right wing Christian Democrats.

The free radios still have a battle on their hands; they are still limited to a range of 100 watts, but for the first time Belgian advertising agencies have the potential available to reach a wide audience with a flexible medium. "This brings Belgium into the 20th Century," said one ecstatic media director in a Brussels agency.

Six of the largest free radios have grouped together under the direction of the Information et Publicité Belge, owned by Radio Television Luxembourg, to form Radio Key which is coordinating the sales of spots across the nation. They have a potential audience of some 4 million listeners and a recorded audience of 560,000.

The national newspapers have taken a dim view of the event, but on a local level the radio stations and newspapers are cooperating to share advertising sales and news-gathering. RTL is thought to have been unusually crafty in setting up Radio Key as it thereby keeps its monopoly on Belgium's commercial airwaves. Agencies complain, though, that the spot costs are too high at BF125 ($2.80) per thousand. The cost per thousand on RTL is just less than $4.48, but this is way above the four-to-one cost ratio of tv to radio found in the U.K. or the U.S.

None of the starved Belgian advertisers using the free radio stations really are complaining, though, and heading the field on the first day's broadcast were Procter & Gamble, L'Oreal, Lois jeans, Henkel and others. Spots still are being kept to four minutes per hour and avoid advertising to children as well as tobacco and political advertising, but this may change as confidence grows. And who knows where this action in Belgium may lead. Can the free radios of France, Holland and Germany be far behind?#

Scents off

"The delightful new body spray with the reassurance of a gentle deodorant" is how Lever Bros. is describing its new Impulse all-over-body spray in ads supporting national launch (AA, March 29), via J. Walter Thompson USA. It comes in four scents: Delightfully Daring, Instantly Innocent, Mysterious Musk and Suddenly Sassy.

Penney picks Gill, Howell

NEW YORK—J.C. Penney Co. has elected William Howell and Robert Gill as vice-chairmen. Mr. Howell is an exec vp and director; Mr. Gill is a senior vp-director, corporate personnel and planning. The appointments coincide with the retirements of vice-chairman Walter J. Neppl on July 1, and Kenneth Axelson, exec vp-director, finance and public affairs, on Aug. 1.

Shop promotes Hirsch

NEW YORK—Shaw Elliott has changed its name to Hirsch Elliott, reflecting the promotion of Bernard Hirsch, exec vp-creative director, to principal. The agency was formed in 1966 by Herbert Shaw and Don B. Elliott, former employes of Muller Jordan Herrick (now Muller Jordan Weiss). Mr. Shaw left the agency in 1978 to pursue other interests.

Action Graphics bought

DALLAS—Casey Cohlmia Advertising & Public Relations has purchased Action Graphics, Waco, Tex., from Patti and Jack Durrett. Karen Wilerson, account exec at Action Graphics, becomes office manager.

Coen trims '82 $ forecast

By CHRISTY MARSHALL

NEW YORK—With ad spending in local media softer than expected, Robert Coen, media spending forecaster and senior vp, McCann-Erickson USA, is toning down his predictions for 1982.

Late last year, Mr. Coen estimated that 1982 ad spending in the major media would increase 11.7% to $68.5 billion. But last week, at his midyear presentation here, Mr. Coen scaled down his estimate to $68 billion because of sluggishness in local newspapers and retail advertising. The adjusted total represents a 10.4% increase over 1981.

Said Mr. Coen, "Our December, 1981, projections for 1982 advertising expenditures were based upon the then-current consensus of a 9.2% GNP growth. Current expectations have been lowered to less than 6%. In comparison, advertising expenditures will not only continue to grow faster than the economy as a whole, but it is evident that the differential is widening as advertising is increasingly used to solve problems created by the economy. The ratio of advertising-to-sales is expected to rise."

By category, Mr. Coen expects ad spending to be up 8% to $3.8 billion in magazines, up 13% to $3.1 billion for national newspaper linage, up 12% to $6.2 billion for network tv, up 13% to $4.2 billion for spot tv, up 12% to $245 million for network radio, up 9% to $975 million for spot radio and up 11% to $19.7 billion for all other national media (including direct mail).

The greatest downward revision in Mr. Coen's midyear outlook came in total local advertising. Last fall, Mr. Coen forecast total local advertising in 1982 would show an 11.9% increase over 1981 to $30.7 billion. He has revised that to read: Up 9.6% to $29.6 billion. He attributed the adjustment to the "economic downturn" that has lasted longer than expected and to "lousy" retail sales.

■ Mr. Coen's earlier predictions were also based on a far more optimistic economic picture than has come to pass. "The recession is deeper and longer than expected," Mr. Coen said.

In the first four months of '82, network tv ad revenues were up 13%. By individual network, CBS is up 21% over 1981, ABC is up 13% and NBC showed a scant 5% increase over the same period in 1981.

The strongest performance has come in spot tv, up 21.5% for the first quarter over a year ago. Without an inventory shortage at the networks, it would have been up 18%, Mr. Coen said. He attributed the increase to a spillover from network, an increase in rebate advertising and the feeling among advertisers that they can cover their major markets just as effectively with spot tv. The fact that 1982 is an election year also bodes well for tv, Mr. Coen noted.

■ One of the poorest performers continues to be magazines, now "paying the bill for the sluggish economy," Mr. Coen said. "But the reports suggest we may be at the bottom; it may be getting better." For the first four months of 1982, there was no increase in pages and only an 8% increase in revenue for magazines.

National newspaper ad revenues are up an estimated 17% in the first four months of '82, with substantial increases in automotive. But ad spending in local papers continues to be soft, especially in classified advertising, Mr. Coen noted. For the first third, local newspaper advertising was up 11% over the same period a year ago.#

THE OUTLOOK FOR 1982

	CHANGE OVER 1981	1982 FORECAST (000,000)
Magazines	+ 8%	$ 3,810
National Newspapers	+13	3,075
Network TV	+12	6,225
Spot TV	+13	4,225
Network Radio	+12	245
Spot Radio	+ 9	975
Other National	+11	19,715
Total National	+11.0	38,270
Total Local	+ 9.6	29,650
Grand Total	+10.4%	$ 67,920

McCall raps attacks on FTC

(Continued from Page 3)

ness,' Dave simply disagrees with the overwhelming majority of our membership. Our requests to the membership to support the associations' position on this issue to their congressmen and senators has drawn the biggest response we have seen since 'kidvid,'" Mr. Adams said.

Mr. McCall's jab at the associations was the only sour note for AAF leaders using the convention to rally member adclubs to support its FTC proposals in Congress. While there is sharp debate in Washington over the industry's major goal—elimination of FTC authority to regulate unfair advertising—little of the acrimony seeped into the AAF convention program until the McCall speech.

AAF delegates heard their leaders warmly praise FTC chairman James C. Miller III. Chairman Miller's emissary to the convention, FTC lobbyist Bryce L. Harlow Jr., responded in kind. Nearly ignored in their remarks was the fact that chairman Miller and his fellow FTC members have denounced the industry's bid to end regulation of unfair advertising as an unjustified "special exemption."

Later in the convention, Sen. Robert Kasten (R., Wis.), the manager of FTC legislation in the Senate, received a hero's welcome as the prime sponsor of FTC legislation that does away with unfair advertising as a violation of the FTC act. Sen. Kasten said eliminating regulation of unfair ad practices is justified because advertising is protected by the First Amendment.

He told AAF "the pressure has got to come from you to pass a bill," and he said many members of Congress believe the FTC should not have the power to regulate truthful ads that it finds are somehow unfair, and that his bill is "the right way to do it, the logical way to do it." AAF members enthusiastically applauded the senator's attack on big government.

The next day, however, Mr. McCall said antigovernment feelings have gone too far. "Men and women who are fair-minded and deeply philosophical on almost every other issue give knee-jerk reactions to their government," he said, adding, "Government excesses are every bit as responsible as business prejudices for the current climate of antagonism in the U.S., but let's be careful that we not go too far in dismembering government and its functions that were designed to serve the American people, us included."

His own agency and clients, he noted, "have been stung more than once by the FTC. I have considered them to be arbitrary and unfair on occasion. I, in a flight of rhetoric, even likened their young lawyers to the Baader-Meinhof gang. So I am no woolly head who has no sympathy with the annoyance that people feel for the FTC."

Consumers and honest businesses need an FTC to control the "few but dangerous" unscrupulous business people, he said. And he called FTC's ad substantiation requirement and its policing of ads for both deception and unfairness "pillars of public protection."

But he complained that these requirements have come under attack since FTC chairman Miller arrived at the commission, and that some ad leaders were too quick to swing behind the chairman "when even his fellow Republican commission members were not in agreement." He cited a Four A's press release in which the association said it fully supports "the general approach" of the Reagan administration and chairman Miller toward the FTC and welcomes a review of its ad substantiation program."

"It is heady stuff," he said, "to have an administration committed to the dismantling of many government functions. But, our business must hew to the principle of judging each issue by its impact on the welfare of the public as well as its impact on business."#

Big Stroh revamp due

By ROBERT REED

Stroh Brewery Co. is expected to announce this week major changes in the marketing department of its recent acquisition, Jos. Schlitz Brewing Co.

In addition to revealing which members of the Schlitz marketing team will remain, and in what capacity they will serve, Stroh brass may shed some light on the future of Schlitz exec vp-marketing Anthony Amendola. His decision, sources say, depends on the responsibilities he is given.

So far Stroh is showing a propensity for installing its own execs in key Schlitz posts, prompting speculation that John Bissell, Stroh vp-marketing, will also be heading all Schlitz marketing efforts.

High-level changes at Schlitz were announced last week. As expected, Peter Stroh, chairman-chief executive officer of Stroh, assumes the same posts at Schlitz. Former chairman Daniel McKeithan resigned and Roger Fridholm, Stroh president, also became president of Schlitz (AA, May 31). Last week's announcement said that Frank Sellinger will remain with Schlitz as vice-chairman. Brewery sources now say the 67-year-old Mr. Sellinger will be with the company for the duration of the summer, but will retire by September.

In his post as vice-chairman, he will no longer have operational responsibilities and will be acting more in a consulting capacity for Stroh while it completes its managerial takeover of Schlitz.

Another reason insiders cited for his staying for the transition is that he is the Schlitz brand's ad spokesman. Although Mr. Sellinger's presence in the current Schlitz campaign has been lessened, he is still the image bolstering the theme: "Behind every Schlitz is a man who knows his beer."

J. Walter Thompson USA, Chicago, is working on a new Schlitz campaign expected to debut in the fall. The new work does not feature Mr. Sellinger, according to sources. Regarding advertising, Mr. Bissell said the company is "reviewing the bidding in terms of work done [by the agencies]." Mr. Sellinger was unavailable for comment on his position.

In other news, Teamsters union locals at three of the Schlitz breweries have gone out on strike. Unions in Tampa, Winston-Salem and Longview, Tex., walked out last week following three months of unproductive negotiations and the union's rejection of a company contract proposal.#

BPAA told not to cut ads during recession

By STUART EMMRICH

PHILADELPHIA—When a recession hits and money is tight, companies seeking to trim expenses often decide that an advertising budget might be expendable.

But a market researcher speaking at this year's annual conference of the Business/Professional Advertising Assn. warned that cutting back on advertising during a recession can have damaging repercussions when the economy rebounds. And Valerie Kijewski, an associate at the Strategic Planning Institute, added that increasing advertising in a recession actually can help a company boost its competitive position.

She said research by the SPI showed that companies increasing their advertising during a recession raised their market shares by at least a point and a half, an increase of 25% over what the market share for average companies was during the period.

The ability for companies to move ahead of competitors during a recession is enhanced by a tendency for most companies to become less aggressive in a recession, to blame losses on economic conditions rather than moves by competitors and not to track market share changes as closely as they do revenue figures, Ms. Kijewski said.

Increasing advertising during this period, she argued, can boost even further these potential gains, because so few companies do it.

"Only about 25% of businesses try to dramatically increase advertising during a recession. But they learn that it can pay off rather well," Ms. Kijewski said.

In response to questions about whether increasing an advertising budget during a recession means that a company might further hurt its ability to make a profit, Ms. Kijewski said there was little difference in return on investment between companies that do and those that don't advertise during a recession. But she added that those who do advertise in a recession can grab an increase in market share that likely will be retained.

"Increasing advertising during a recession doesn't hurt short-term bottom line, but does enhance long-term profitability," she said.#

Anti fever hits Argentina

(Continued from Page 2)

to show tv programs he bought in the U.S.

Mr. Simoncini owns a network of private tv stations in the country's interior and said he doesn't know what U.S. shows he should buy this year, if any, because he's afraid the government might prohibit him from showing them.

However, so far his fear seems unfounded. Just before the government's surrender, it ordered state-controlled Channel 13 in Buenos Aires to halt the English science-fiction movie, "The Limbo Connection" halfway through, and replaced it with "The Waltons."

Channel 13 said it was flooded with angry phone calls from viewers protesting the screening of an English film while Argentines were awaiting news of a British assault on their troops defending the islands.

For marketers, the surrender might have changed all the rules. One leading marketing head of a large automobile manufacturer said some companies are thinking of switching their agency affiliation from U.S. to local agencies. At least one U.S. agency official is worried about a possible campaign to bad-mouth U.S. agencies, which could affect the government's attitude toward such agencies. "If the government shows partiality, it could have a huge effect because the government controls the tv stations," he said.

Sources say Chesterfield pulled its long-running "The Most Famous American" ads out of circulation once the war began and that any new product introductions, particularly cigarets, henceforth cannot have English-sounding names. Even items such as jogging shoes, now commonly called "joggers," will be questioned, one source said.

Commercials showing young people dancing and singing in jeans and other ads probably will not be acceptable now, as "these young people are several years more mature following the war," the source said.

■ Ironically, the government's own pro-war commercials might have contributed to an expected-change in leadership. The slick ad campaign was so effective in convincing the population that victory was near, sources say, it generated massive disappointment when the surrender was announced.

The overriding question might well be whether the economy will return to strict controls or continue on its prewar path toward a free market.

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100 Leading Media Companies

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